FINAL REPORT

USAID PERSONAL SERVICES

CONTRACT NEB-0001-S-00-1003-00

(PORTUGAL)

CONTINUING EDUCATION

FOR ADULTS:

EDUCACAO RECORRENTE

JANUARY, 1981

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OVERVIEW OF "EDUCACAO RECORRENTE" IN M.E.C./PORTUGAL

A brief sketch of the evolution of adult education in post-1974 Portugal is outlined. It is followed by a description of its place in the Ministry of Education and Science (M.E.C.) in terms of organization, staffing and program. Concerns regarding the current state of the art in terms of content and organization are then briefly discussed.

1. Evolution

Since the April 74 Revolution, equalization of opportunity for education as it relates to the population over 14 years of age has been a concern of the Portuguese government, and, consequently, M.E.C. Decreto-Lei 534/79 reformed the organizational definition of "Permanent Education" within the Ministry to "Adult Education" on December 31, 1979, having as its impulse Lei No. 3/79. This law seeks the "Elimination of Illiteracy," which is to be implemented according to the specifications found in the National Plan for Adult Literacy and Basic Education (PNAEBA) published in June, 1979.

2. Organization

The Division of Adult Education (DGEA), then, is one of nine functional sub-groups under the Secretary of State of Education in the Ministry structure on an equal organizational plane with Basic Education, Secondary Education, Private Education, School Equipment, Personnel, Institute of Educational Technology, Institute of Social Service in Schools, and the Portuguese Language and Culture Institute. Other major Ministry departments are Higher Education, Sports, Ministry Administration and Planning and Studies (See Figure 1).

The Division of Adult Education has responsibility for the execution of PNAEBA (See Appendix 1), which is a detailed five-year plan aimed toward:

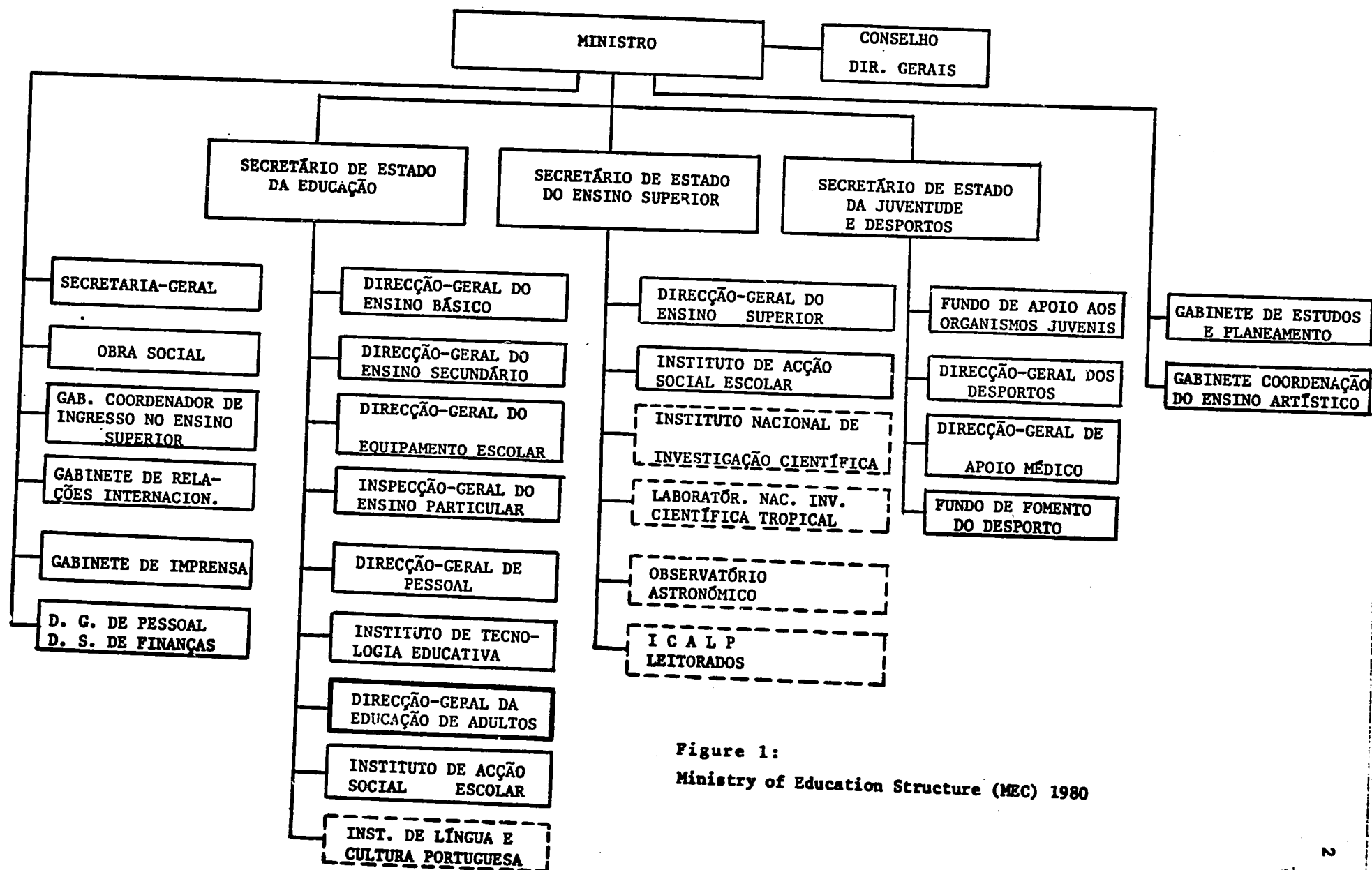> . Founding and installing of a National Institute for Adult Education;

Figure 1:
Ministry of Education Structure (MEC) 1980

The chart shows the following structure:

- **MINISTRO**
- **CONSELHO DIR. GERAIS**

Under MINISTRO, three Secretários de Estado and two side boxes:

SECRETÁRIO DE ESTADO DA EDUCAÇÃO
SECRETÁRIO DE ESTADO DO ENSINO SUPERIOR
SECRETÁRIO DE ESTADO DA JUVENTUDE E DESPORTOS

Left column (direct under Ministro):
- SECRETARIA-GERAL
- OBRA SOCIAL
- GAB. COORDENADOR DE INGRESSO NO ENSINO SUPERIOR
- GABINETE DE RELA-ÇÕES INTERNACION.
- GABINETE DE IMPRENSA
- D. G. DE PESSOAL / D. S. DE FINANÇAS

Under SECRETÁRIO DE ESTADO DA EDUCAÇÃO:
- DIRECÇÃO-GERAL DO ENSINO BÁSICO
- DIRECÇÃO-GERAL DO ENSINO SECUNDÁRIO
- DIRECÇÃO-GERAL DO EQUIPAMENTO ESCOLAR
- INSPECÇÃO-GERAL DO ENSINO PARTICULAR
- DIRECÇÃO-GERAL DE PESSOAL
- INSTITUTO DE TECNO-LOGIA EDUCATIVA
- DIRECÇÃO-GERAL DA EDUCAÇÃO DE ADULTOS
- INSTITUTO DE ACÇÃO SOCIAL ESCOLAR
- INST. DE LÍNGUA E CULTURA PORTUGUESA

Under SECRETÁRIO DE ESTADO DO ENSINO SUPERIOR:
- DIRECÇÃO-GERAL DO ENSINO SUPERIOR
- INSTITUTO DE ACÇÃO SOCIAL ESCOLAR
- INSTITUTO NACIONAL DE INVESTIGAÇÃO CIENTÍFICA
- LABORATÓR. NAC. INV. CIENTÍFICA TROPICAL
- OBSERVATÓRIO ASTRONÓMICO
- I C A L P LEITORADOS

Under SECRETÁRIO DE ESTADO DA JUVENTUDE E DESPORTOS:
- FUNDO DE APOIO AOS ORGANISMOS JUVENIS
- DIRECÇÃO-GERAL DOS DESPORTOS
- DIRECÇÃO-GERAL DE APOIO MÉDICO
- FUNDO DE FOMENTO DO DESPORTO

Right side boxes:
- GABINETE DE ESTUDOS E PLANEAMENTO
- GABINETE COORDENAÇÃO DO ENSINO ARTÍSTICO

2

- Organization for system of cultural and educational centers of permanent education;

- Implementation of integrated regional programs of adult basic education and cultural development;

- Literacy and basic elementary education;

- Improvement and extension of fifth and·sixth year education for adults;

- Support to popular education;

- Action in the emigration sector.*

To accomplish these goals, the structure displayed in Figure 2 for the Division of Adult Education has been established during 1980. As of December 1980 not all the positions have been filled in the DGEA structure. "Educacao Recorrente," lifelong learning, has been initiated as a task force under supervision of the DGEA General Director and does not appear on the organizational chart.

Offices for the DGEA are in three locations with the Director General's and DSAT offices at Avenida 5 de Outubro, 35-7º, DSAE and DAAEP offices at Avenida Duque d'Avila, 193-8º and DMA and Educacao Recorrente offices in the Biblioteca Nacional office wing at Campo Grande, 83-2º.
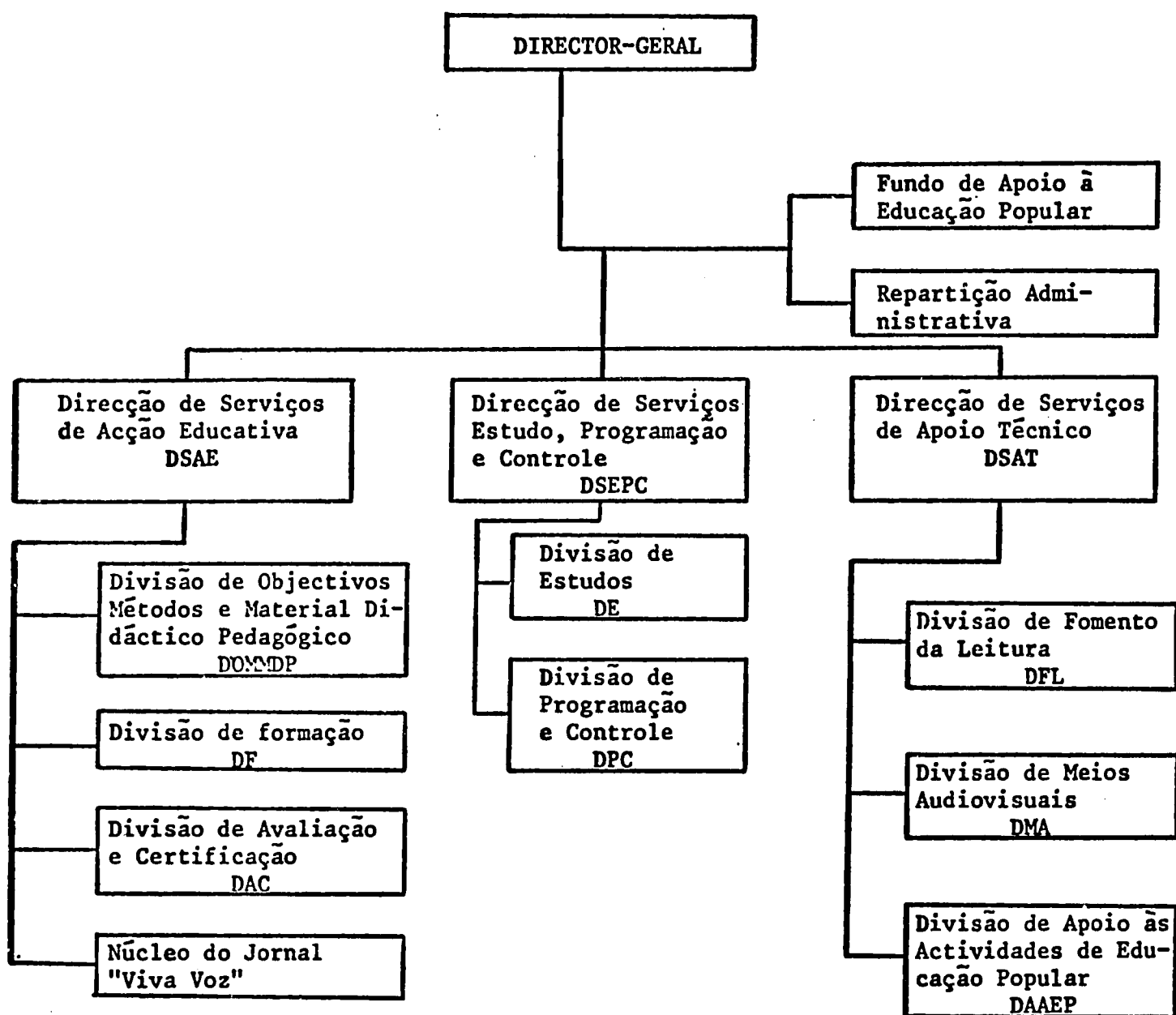
3. Personnel

Manuel Lucas Estevao is General Director. Within this division, the Program Development and Services Department is headed by Maria Marcia Trigo. Sub-sections under this department include Division of Objectives, Methods and Materials headed by Lizete de Mattos, Division of Training headed by Isabel Ferreira Martins, Division of Evaluation and Certification headed by Maria Amelia Mendonca, and a group responsible for an adult education newspaper.

The "Educacao Recorrente" task force is given administrative assistance by Eduardo Bue Alves, formerly an English teacher in secondary schools. Members of the task force include:

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*p. 122, Plano Nacional de Alfabetizacao e Educacao de Base dos Adultos (PNAEBA). Lisboa, Junho, 1979.

Figure 2   **4**

Division of Adult Education Structure (DGEA/MED) 1980

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                          ┌─────────────────────┐
                          │   DIRECTOR-GERAL     │
                          └─────────────────────┘
                                                      ┌──────────────────────────┐
                                                      │ Fundo de Apoio à          │
                                                      │ Educação Popular          │
                                                      └──────────────────────────┘

                                                      ┌──────────────────────────┐
                                                      │ Repartição Admi-          │
                                                      │ nistrativa                │
                                                      └──────────────────────────┘

┌─────────────────────┐   ┌─────────────────────┐   ┌─────────────────────────┐
│ Direcção de Serviços │   │ Direcção de Serviços│   │ Direcção de Serviços     │
│ de Acção Educativa   │   │ Estudo, Programação │   │ de Apoio Técnico         │
│ DSAE                 │   │ e Controle          │   │ DSAT                     │
│                      │   │ DSEPC               │   │                          │
└─────────────────────┘   └─────────────────────┘   └─────────────────────────┘
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Divisão de Objectivos Métodos e Material Didáctico Pedagógico
DOMMDP

Divisão de Estudos
DE

Divisão de Fomento da Leitura
DFL

Divisão de formação
DF

Divisão de Programação e Controle
DPC

Divisão de Meios Audiovisuais
DMA

Divisão de Avaliação e Certificação
DAC

Divisão de Apoio às Actividades de Educação Popular
DAAEP

Núcleo do Jornal "Viva Voz"

- Engineer Jose Silveira - Personnel Development, Labor Ministry;

- Pedro Esteves - Personnel Development, Empresa Publica, das Aguas de Lisboa (community action experience);

- Laura Godinho - Evaluation Section, Adult Education (evaluation specialist - U. of Stockholm);

- Ana Maria Calado - Planning and Studies Secretariat, M.E.C. (statistician);

- Jose Henrique Dias - Basic Education Division (learning evaluation specialist);

- Maria Helena Bruno da Costa - Planning and Studies Secretariat, M.E.C. (Fulbright Award to U.S.);

- Eduardo Guerreiro - Secondary Education Division;

- Maria Joao Bustoff Silva - Staff member, Secretary of State for Education (sociologist).

Members of this group, named in March, 1980, with the exception of Eduardo Bue, continue to occupy their regular posts. Only Eduardo Bue has been released from his regular full-time position.

4. Program Development: "Educacao Recorrente"

To develop program plans for implementation of the fifth point in the PNAEBA plan, Secretary of State for Education, Roberto Carneiro, in Despacho 21/80 of March 4, 1980, called for the organization of a task force for "educacao recorrente," or lifelong learning, according to the Cultural Cooperation Council of Europe's definition of the term (CERI, OCDE, 1973), which proposed to foment lifelong learning via alternation between studies and other activities. According to this dispatch, in 1976, there were 100,000 adult Portuguese attempting to attend night schools which were exact replicas of regular day school programs organized for children and adolescents. Two directives were given the task force: 1) elaborate guidelines for lifelong learning and 2) organize experimental projects to be launched by October, 1980, which exemplify means to implement lifelong learning. Weekly task force meetings beginning in March, 1980, produced three documents (see Appendix 2).

The documents include a "First Report about Lifelong Education Policy" dated May, 1980, which, in the general discussion section, is

consistent with the internationally accepted principles of the concept of lifelong learning. However, the document's implementation section is not consistent with these principles. Instead, classic notions of time in school and separation of disciplines are used to define implementation suggestions. The second document produced by the task force in July, 1980, National Plan for Lifelong Learning, PNERA, lays out course guidelines for equivalency in the first six years and next three years of education, admitting correspondence courses and instructional modules as alternatives to attending class for completion of requirements. Notable, again, in this plan is the reliance on traditional program planning in terms of instructional/class contact time, disciplines and evaluation, which includes final exams. A third task force document addressing objectives, curriculum and content for the fifth and sixth years of education, October, 1980, lays out subjects of Portuguese, Math, Foreign Languages and the World Today for courses to be held via regular class sessions with formative evaluation and final exams. Important to the formulation of these documents were results of a public forum called to discuss the concept of lifelong learning. Representatives from unions, public service and industry attended.

Task force deliberations resulted in the delineation of four pilot projects as means of experimenting with implementation of the lifelong learning concept. Each project will offer adults, who are literate and have the equivalency of four years' schooling, an opportunity to continue their schooling. Variation in instructional mode, instructional level and instructional agency is planned in the pilot projects. At

PILOT PROJECTS IN "EDUCACAO RECORRENTE," 1980-1981

Agency	Instructional Level	Instructional Mode
Lisbon Water Works (EPAL)	4th to 6th years	Classes at work site with monitors
Ministry of Labor (MT)	Primary review, 5th to 6th years	Classes at work sites with monitors
Institute of Instructional Technology (ITE)	5th to 6th years	Correspondence courses with some programmed texts
Secondary Night Schools	Secondary-level subjects	Instructional modules

present (December, 1980), there is no carefully detailed set of objectives, programs and/or instructional materials and implementation calendar for all the projects. Subject area commissions were appointed in November 1980 to elab.rate adult-oriented programs. They are to present results of their efforts by January, 1981. Meanwhile, the status of each project is different: classes have actually begun in the EPAL project, the MT group is conducting an internal assessment, ITE has elaborated a formal proposal including a budget request and is awaiting its approval before beginning operations, and the secondary group is still in the initial stage of working the proposal through its dual Ministry and School deliberative mechanisms.

Discussions with pilot group teams led to the several conclusions as to what DGEA could learn from the projects. EPAL should serve as an observation post for recording aspects of adult pedagogy and learning style as well as a testing ground for innovative programs that combine disciplines. M.T. should elaborate job profiles. These can then be compared to competency profiles, to be developed by DGEA and discussed later in report, thus adding another means of determining equivalency for certification. The correspondence course materials should be useful for courses beyond the correspondence courses.

5. General Concerns

Several conceptual factors in the current state of the "educacao recorrente" effort need modification if the program is to fit the spirit of PNAEBA.

First is the lack of planning to secure an adequate data base upon which to build program. Pilot projects seek to implement different modes of "educacao recorrente" in isolation from a substantive analysis as to how models that may result can be applied. Lacking is a plan that makes a connection between the micro level of the projects and the macro level of the national situation. Before significant effort and funds are expended, better knowledge of details such as how many adults and where they are located needs to be confirmed. More importantly, the economic and social benefit for Portuguese development that could possibly accrue from "educacao recorrente " needs to be addressed. And it can

only be seriously addressed by placing population data and manpower projections against national ability to invest.

Second, the dominant orientation of the task force and resulting pilot projects is to develop programs that parallel regular schooling. There is nothing in the concept of "educacao recorrente" which denies this orientation. However, to entirely focus program development on paralleling regular schooling programs would be a very limited view. The important point is that this definition of "educacao recorrente," or any other, should evolve from public needs. Needs assessment may confirm the appropriateness of initial programs in "educacao recorrente" taking the direction they currently have.

Third, related to the development of "second opportunity" programs for formal schooling is the approach to certification of such schooling. "Educacao Recorrente" proposals, to date, reflect a traditional view of certification that promises to be both cumbersome to manage bureaucratically and, for adult clients, unmotivating, inhibitory and in opposition to the pretensions of PNAEBA and the spirit of Portaria No. 419/76.* For example, juries, organized by the Certification Section (DAC), are called to examine individual adults seeking certification at the basic education level. To respond with alacrity and sensitivity to real needs for certification requires means of evaluation which are competency-based, permanently available in all geographical areas and which permit various modes of individual assessment.

Fourth, in the press to delineate pilot projects, the necessity of coordination and integration with the rest of the DGEA activities must not be overlooked. DGEA needs to seek consensus among its various program divisions as to how "educacao recorrente" fits into the context and spirit of the rest of its objectives and programs. Responsibility for the whole panoply of program needs—which internationally would fit under the title of "Educacao Recorrente" (energy conservation, nutrition, specific vocational training and/or manpower development, environmental protection, for example)—must be debated and distributed.

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*pp. 45-48, PNAEBA, Lisboa, 1979.

6. Organizational Concerns

Entwined with these conceptual issues are several organizational concerns that require thought.

First is the organizational resolution of the fourth conceptual problem. Obviously, one full-time person, charged with assisting the deliberations of a task force whose members continue to hold other full-time positions, cannot fulfill the range of skills and respond to the quantity of tasks required for "educacao recorrente" program development. Continuance of the ad hoc nature of the effort with no resolution of where, how and to what degree "educacao recorrente" fits into the existing structure and activities could be counterproductive for DGEA and "educacao recorrente." Formulation of a task force is good administrative procedure for development of ideas for new ventures or the resolution of sensitive problems. Task forces, however, are ill suited to develop programs and control pilot projects. A natural solution would be to incorporate "educacao recorrente" as an integrated extension of DGEA current activities.

Second, within MEC, DGEA must address the possibility of duplication of efforts. To what degree would the "educacao recorrente" program complement and/or duplicate the Ensino Preparatoriao as it currently functions for adults under DGEB? The same question should be investigated with regard to Ensino Unificado and DGES. Currently these divisions celebrate contracts with other entities for the functioning of adult courses. Equivalency certification is either attested to by local teachers or annual subject matter exams. PNEABA foresees the evaluation of current adult classes. Results of such a study would be instructive for the conciliation and articulation of efforts of all three—DGEB, DGES, DGEA—major MEC divisions currently involved with equalizaiton of opportunity and imporvement of learning for adults.

Third, as an area of organizational concern, is the functional distribution of program responsibilities within DGEA. According to the organization chart, planning and implementation functions are separated. But, within the implementation departments is a section for evaluation and certification. It would seem, following the logic of the initial separation of the two functions, that evaluation best fits the planning

side and becomes even more difficult to perform when separated from the program control capabilities contacts and data. The certification function, currently combined with the evaluation function, however, is by nature different and can best be envisioned on the service side of the DGEA structure.

PLANNING SUGGESTIONS FOR "EDUCACAO RECORRENTE" WITHIN M.E.C.

Suggestions for continued development flow from the concerns mentioned in the first section and the impressions from contacts briefed in section three. These suggestions fall into three areas—data collection and analysis, advisory board formation, program development—that appear important, given the status of "educacao recorrente" as of December, 1980.

1. Data Collection and Analysis

The apparent assumption that "educacao recorrente" programs can proceed once they have been elaborated and approved from a M.E.C. bureacratic point of view must be questioned. Therefore, a first order of business is the collection of existing data on the following factors:

    a. population over 14 years of age by sex, age group, educational level, type of work, location;

    b. school promotion data for last 10 years so that projections of over 14 years of age population by level of schooling can be made;

    c. inventory of work sites for quantity of employees by ages;

    d. adult night course enrollment and drop-out data for past few years;

    e. cost analysis of using regular M.E.C. teachers to staff possible courses;

    f. cost analysis of current PNAEBA efforts under the title of "1000 Accoes";

    g. cost-benefit analysis of each 1000 workers added to the work force with basic education, with secondary education, with specific skills;

    h. needs assessment of employers, national planners, adults over 14 distinguishing housewives, underemployed, unemployed, and levels of employed to determine their "educacao recorrente" interests.

Only careful examination of these kinds of data can provide adequate justification and orientation for future "educacao recorrente" program development. DGEA must explore the difficult question of return to the nation on the investment its activities represent. DGEA planners in concert with those from M.E.C./GEP could organize already existing data as ⌐ base upon which decisions can be made. Data such as these may reveal, for example, that people between 14 and 18 should be paid to attend regular schooling and kept out of the job market; or, that M.E.C. alone cannot finance the demand for work site courses in basic education.

2. Advisory Board

To further guarantee that "educacao recorrente" programs are responding to felt social needs in an appropriate and acceptable way, the formulation of an advisory board is recommended. This board should include representation from unions, housewives, employers, political parties, armed forces, MEC and other ministries. It should be asked to deliberate on policy in light of needs assessment and population data which will determine program direction. In addition, it should serve as a review body of specific project proposals and year-end reports from "educacao recorrente" professional staff and participants.

3. Program Development

There are nine areas of program development which can serve to assist "educacao recorrente" in its current scope and facilitate the examination of a broader scope for the service.

Important to note for the first four suggestions is the fact that, to be implemented, they necessitate collaboration among DGEB, DGES and DGEA. Since these suggestions pertain to designing responses to adult needs for "regular schooling," it is imperative that all relevant parts of M.E.C. be involved.

     a. Competency profiles. Competency lists specifying the level and type of ability a person should possess in order to be certified as having the equivalent of a basic education (end of sixth year of schooling and a general unified—end of the ninth

year). These lists should be published and procedures estab-
lished so that an adult could present him/herself to any dis-
trict education office and have his/her competency in the vari-
ous items checked on the spot by submission of a portfolio of
his/her work in an adult course or by a unified exam taken in
the office. The portfolio for exam should be compared to the
competency profile. When applicant's rok meets the profile
specifications, a certificate is granted. When there are
competencies still to be reached, the candidate is shown which
they are and invited to return to the verification center when
he/she wishes to demonstrate competency in the remaining items.
Meanwhile, a cumulative record of each person's profile is kept
for future reference.

b. Equivalency exam construction. Equivalency exams with several
forms need to be developed as a means of implementing the spirit
of "educacao recorrente" which is to give credit for competency
whether it has been obtained via regular schooling or life ex-
periences. These exams must reflect the competency profiles,
which, in turn, should reflect what is basic, not exotic, knowl-
edge and skill for a given level of schooling. The intent of
these exams is not to have results that stimulate normal distri-
bution, but to recognize basic and essential competence.

c. Materials development. Plans for correspondence courses and
modularized instruction appear to be appropriate choices for
parallel schooling program directions. Programmed instruction
appears to be an appropriate option for lower levels of instruc-
tion envisioned in the correspondence course project. However,
this hypothesis should be tested.. Commandant Saturnino Mattos
of the Marinha is the obvious person to call upon for the prepa-
ration of program writers. At more advanced levels, some thought
should be given less sophisticated instructional organization
such as study guides and existing texts.

d. Revision of legal requirements for equivalence recognition.
In order to implement the use of competency profiles and equiva-
lence exams, the legal requirements for equivalency recognition
will need to be modified. Principal characteristics of these
modifications should be decentralization, multiple opportunity
for competency demonstration, alternative ways to demonstrate
competency, client-selected time for competency demonstration,
accumulation of competencies and public nature of competencies.

e. Guidelines for M.E.C. - Work Site Cooperation. Using and extend-
ing the guidelines set out by PNAEBA seems in order here. Pre-
planning the responsibilities that M.E.C. can assume and those
an "empresa" would need to assume in the event of, for example,
the loaning of teachers for courses, needs to be done. Again,
the internal agreement among M.E.C. divisions--DGEB, DGES,
DGEA--about which division has authority for what types of ac-
tions needs to be s · ·. fied and made coherent before further
steps involving wr   _ites in M.E.C.-sponsored adult education

f. Material and resources inventory. One of the important services
    DGEA/"educacao recorrente" can offer is the compilation and
    publication of an inventory or catalogs of materials and re-
    sources for adult education. This publication, updated periodi-
    cally, should include materials such as pamphlets, films, courses,
    periodicals that could be used by any interested individual or
    group. Resources such as speakers, performers, libraries,
    museums, and services should also be listed. Details on where
    each entry could be located and/or how utilized should be in-
    cluded. Making such information available would serve the
    objectives of 1) preventing duplication of effort, 2) facili-
    tating program development, and 3) promoting better utilization
    of existing resources and materials.

g. Training-personnel development inventory. Forming a network of
    directors of training-personnel development can be an invaluable
    inventory for needs assessment and program development in
    "educacao recorrente" activities. Spin-off possibilities for
    work-site assumption of "educacao recorrente" responsibilities
    will increase to the degree that communication between people
    responsible for this area is fostered. Unions, ministries,
    armed forces, private and public industry, etc. should all be
    solicited to participate in such a network. Periodic meetings
    and/or publications could share experiences and discuss issues
    common to all.

h. Training modules for trainers. For focalizing the issues
    peculiar to adult learning and instruction development of video-
    tapes with printed seminar guides would be very useful. There
    is a pedagogy for adults. Having copies of a training module
    ready for distribution would enormously facilitate future train-
    ing needs. Such a package should include: needs for lifelong
    learning, how to value what an adult knows, what adults can do
    that children cannot, making the transition from teaching chil-
    dren to teaching adults, and how to promote learning to learn.

SUGGESTIONS FOR TECHNICAL ASSISTANCE TO MEC/DGEA

DGEA needs to continue seeking linkages with international agencies in order to better prepare "educacao recorrente" program development and, with this, for optimal execution of PNAEBA. Assistance from the European Common Market and Council of Europe are important sources. Because of language identity, contacts with the Brazilian experience seem to be a fertile avenue. Following are some suggestions for which American technical assistance seems particularly appropriate.

1. **In-Country Training with U.S. Professors**

Two intensive courses are suggested. They could be part of one course. However, the sequence of topics should be maintained.

   a. Competency-based education. Participants in this course should represent DGEA, DGEB, DGES. Course would give rationale and methods for arriving at competency. Participants would begin process of defining competencies. Competency-based instruction would be exemplified and plans for implementation discussed.

   b. Developing criterion-referenced evaluation. Participants are same as for competency-based course. Actual development and validation of instruments would follow instruction in technique.

2. **M.E.C. Staff Training in U.S.**

Actual program observation is another kind of training which would be suggestive and instructive to DGEA staff charged with program development.

   a. California Adult Education System. Professionals who have observed another system as a shared experience can be of great value upon their return. Adult education activities to be observed in California should include: Adult Education connected to a school district, a junior college, a job training project, community school (Mott version), woman's re-entry counseling, etc.

   b. Competency-based system of education in South Carolina. On-site view of the transformation of this philosophy has caused from state department to local schools and parent groups.

3. **Technical Assistance**

Consultants with expertise in the following areas could be useful

to the development of the planning suggestions outlined in previous
sections of this report. Bibliographic support should accompany or even
precede the suggested courses (see Appendix 5).

a. Educational statistics and information systems. This person
should help in the mounting of collection matrices and design of
analysis formats according to a list of policy issues to be
developed in collaboration with DGEA/DAC and DSEPC.

· b. Training educators of adults. This person should assist in the
planning and development of a training module in collaboration
with DGEA/DF and ITE.

c. Curriculum development and evaluation. This person should orient
and accompany the development of competency profiles and exams
as a follow-up to the courses given in these areas.

PROGRAM DEVELOPMENT AND TECHNICAL ASSISTANCE CALENDAR SUGGESTIONS

Staff development is an intricate task. Somehow, a balance must be
struck between responding to public demands for program while preparing
a staff to channel and evaluate these demands so that the best return
for the investment can be better assumed. To the degree that the pro-
gram development suggestions related seem appropriate and possible,
technical assistance can be negotiated to assist/implement these sug-
gestions.

Figure 3 is an attempt to make a calendar for activities previously
suggested, combining USAID technical assistance at appropriate phases.
Five phases are projected over possibly one year; however, this projec-
tion could easily be expanded over more than the period of one year, as
shown in Figure 3. The following narrative details activities for each
phase.

1. Data Collection and Analysis

If DGEA can assign a M.E.C. statistician and/or planning team to the
data collection design task by January 1981 and have a team ready to
collect these data, negotiations with USAID for assistance from a con-
sultant specialized in educational statistics and information systems
should be initiated immediately. This specialist should work inten-
sively with the assigned team for approximately one month. The same

Figure 3

Proposed Timeline for USAID Technical Assistance

Phase	Activity/Direcoes Responsible	1	2	3	4	5	6	7	8	9	10	11	12
1	Data Collection-Analysis/DGEA,GEP	x	x	x									
2	Advisory Board for Ed. Recorrente/DGEA		x										
3	Competency Profiles/DGEA, DGEB, DGES					x	x	x					
3	Equivalency Exams/DGEA, DGEB, DGES							x	x	x			
4	Revision of Legal Requirements/DGEA									x			
4	Collaboration Guidelines MEC-Work Site/ DGEA, DGEB, DGES												
4	Materials and Resources Inventory			x	x								
4	Personnel-Training Inventory			x	x								
4	Training Module						x	x					

USAID Technical Assistance

Phase	Activity/Direcoes Responsible	1	2	3	4	5	6	7	8	9	10	11	12
1	Consultant: Educational Statistics	x		½									
1	Bibliographic Assistance	x											
3	Professor — Competency-based instruction			x									
3	(1 or 2) Criterion-based instruction				x								
3	Consultant: Curriculum Development and Evaluation						x						x
4	Consultant: Adult Education and Instructional Technology						x						
5	MEC Participants — Competency-based instruction												x
5	Adult Education												x

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specialist should return when data were collected to assist in their
analysis. Bibliographic support could be made available at this stage
as a preview for the courses.

2. Advisory Board

Formation of an advisory board should be completed before the data
analysis so that it can be called to deliberate the analysis of the data
and suggest and/or approve general policy-program directions without
delay.

3. Intensive Courses

DGEA plans for intensive courses in competency-based education
and criteria-referenced evaluation should be premised on the written
agreement of DGEB and DGES and DGEA to name representatives who can then
assume competency development tasks following completion of the sessions.
Instruction could be accomplished in one month if participants were per-
mitted full-time attendance; granted half-days, two months' instruction
would be required. Work begun during the intensive courses should be
completed in trial form in time for experimentation for the beginning
of the 1981 school year. Materials development teams assigned to current
pilot projects--correspondence course, secondary modular instruction
and "Circulo Basico"--should also participate in these courses continu-
ing their work upon course completion and seeking to make their materi-
als compatible with competencies developed. In addition, necessary re-
vision of legal procedures for certificate equivalency recognition
should be readied for approval at this stage.

4. Training Module(s) for Trainers

When the following elements of the proposed program development activi-
ties have taken some clearer definition, the consultant in training train-
ers of adults can best be utilized:

> . guidelines for M.E.C. work-site cooperation;
> . materials-resource inventory'
> . training-personnel development inventory.

DGEA/DF staff in cooperation with ITE should be made available to work
with this consultant in writing this training module. Actual production
can occur, if necessary, after consultant's departure.

It would be useful to have the assistance of either the same con-
sultants who presented the intensive courses, or others with similar
expertise to return for follow-up work when initial competency
lists and instruments were drafted and again to evaluate validation pro-
cedures. The first follow-up assistance should detail validation-trial
procedures as well as conduct the in-house content validation.

5. American Observations

During the period when competency profiles and criterion-based
evaluation instruments were being tested, members from MEC/DGEA, DGEB
and DGES should travel to observe adult education and competency-based
education in the U.S. Ideas from these observations would be useful in
drawing up plans for revising or extending "educacao recorrente" pro-
grams.

ACTIVITIES OF CONSULTANT

This section chronicles the activities and contacts made by the
Consultant in addition to highlighting some impressions from these
contacts.

1. Calendar of Activities

From November 17 to December 19, 1980, the consultant was involved
in data gathering, organizing, and directing a seminar, meeting in
planning and discussion sessions, and report writing (see Appendix 3
for detailed timeline). Almost daily contact was maintained with task
force facilitator, Eduardo Bue. In meetings with pilot project groups
either Bue and/or Henrique Dias or Maria Helena Bruno da Costa and Ana
Maria Calado were present. Five work days were spent with different

project groups. In addition, the consultant attended two regular task force meetings, conducted a four-day seminar for over 20 people, conferred with DGEA/DAC staff, DGEA/DF, and DGEA/DPS heads. Three meetings for reporting purposes were held with DGEA Director, Manuel Lucas Estevao. One conference to report recommendations was held with Secretary of State for Education, Roberto Carneiro.

Seminar topics included program examples, program development guidelines illustrative of the "educacao recorrente" philosophy that 1) age, learning source, and learning time should not be used as barriers for recognition or promotion of actual competency and 2) learning and schooling are not necessarily identical (see Appendix 4). Participants responded to this message by recognizing that 1) many "educacao recorrente" activities were already in progress, 2) task force projects were appropriate but limited versions of "educacao recorrente," 3) definition of the scope and responsibilities within DGEA and MEC was inoperative.

2. Impressions from Contacts

The seminar was a useful device for the participants. The topics presented were on a general nature--evolution of lifelong learning concept, a planning-evaluation paradigm for educational projects, examples of lifelong learning projects--which caused debate and reflection about their own activities and conclusions. In addition, participants were "forced" to communicate with each other, which created, according to their feedback, greater cohesiveness among them.

Discussions with EPAL and M.T. at their work sites revealed the probability that many organizations already have professional development structures with personnel and programs in action. They would be quite capable of incorporating MEC versions of "educacao recorrente" in their scope of activities. M.E.C. should take pains to facilitate rather than inhibit what already exists in "educacao recorrente."

Discussions with the correspondence course team at the Instituto de Tecnologia Educacional revealed a very well-equipped facility and a talented, experienced staff that could be used for all manner of "educacao recorrente" and DGEA program elaboration and project execution. Utilization of the existing capabilities of ITE for PNAEBA software needs is an obvious suggestion.

Development of instructional modules as a means of attending adult
needs for secondary education will take more time to implement than
originally foreseen. DGES/MEC and pilot secondary school staffs need
to work the idea through their own planning mechanisms. The finished
product will not succeed if the people who are to use it have not parti-
cipated in its development.

In general, the consultant was impressed with the receptivity and
quality of preparation of people with whom professional contacts were
maintair⁻¹.